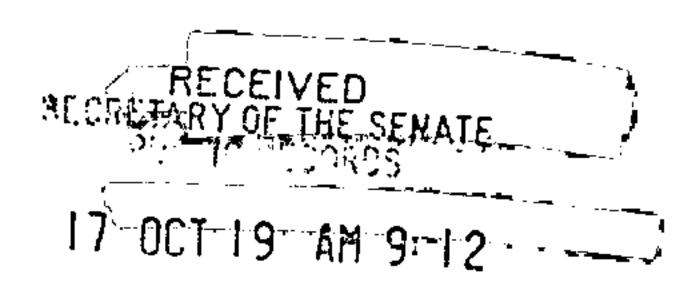
# • COVER SHEET FOR AMENDMENT OF POST-TRAVEL SUBMISSION



Instructions: Use this form as a cover sheet for any paperwork you may need to submit to the Office of Public Records in order to make your Privately Sponsored Post-Travel Submission complete in accordance with Rule 35. Only complete this form if you need to submit an amendment to a post-travel filing you have already submitted.

#### SUBMIT DIRECTLY TO THE OFFICE OF PUBLIC RECORDS IN 232 HART BUILDING

Name of Traveler:
Employing Office/Committee: Tester
The Pew Charitable Trusts Private Sponsor(s) (List all):
September 15-17, 2017 Travel Date(s):
Description/Title of Attached Forms: PSTCF (final version); Invitation from the sponsor (final version)
<u> </u>
Doet troval authorization
Purpose of Amendment (describe the reason for amending original submission):
must be amended with the Office of Public Records in SH-232.

10-19-17 (Date)

(Signature of Traveler)





## Bipartisan Senate Chiefs of Staff Conference

#### The Pew Charitable Trusts

Invites You and Your Spouse To the 6th Biennial

# Senate Chiefs of Staff Management and Leadership Conference

Richmond, Virginia September 15-17, 2017

The Pew Charitable Trusts will host a conference for the Senate Chiefs of Staff from September 15-17, 2017, in Richmond, Virginia. It promises to be an engaging weekend where you can learn from some of the most interesting speakers on management, leadership, and civility today. A copy of the draft agenda is attached.

We will depart Union Station on Friday, September 15, at 2:30 p.m., on a reserved Amtrak car and return via bus on Sunday, September 17, arriving back at the Capitol at approximately 2:15 p.m. Chiefs' expenses (minus alcohol and entertainment) are covered by The Pew Charitable Trusts. We invite your spouse to attend, however you must reimburse Pew for those expenses (estimated at around \$250).

Please <u>click here</u> to register, and we look forward to seeing you in historic Richmond this fall!

Tamera Luzzatto
Senior Vice President, Government Relations
The Pew Charitable Trusts
<a href="mailto:thuzzatto@pewtrusts.org">thuzzatto@pewtrusts.org</a>
(202) 540-6501

The Pew Charitable Trusts makes every effort to comply with federal, state, and local government ethics rules, including when hosting events. Please make sure that your participation is consistent with applicable ethics rules.

The Pew Charitable Trusts
901 E St. NW, Washington, DC 20004
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#### PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1 ***	STATE OF THE STATE
1.	Sponsor(s) of the trip (please list all sponsors): The Pew Charitable Trusts
	·
2.	Description of the trip: Senate Chiefs of Staff Management and Leadership Conference
3.	Dates of travel: September 15-17, 2017
4.	Place of travel: Richmond, VA
5.	Name and title of Senate invitees: Chiefs of Staff (see attached list)
6.	I certify that the trip fits one of the following categories:  (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.  -OR-
	(B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
7.	I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
	AND
	I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
•	I certify that:
	The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for de minimis lobbyist involvement.  - AND -
	The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal

except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).

9.	USE ONLY IF YOU CHECKED QUESTION 6(B) I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:
	<ul> <li>(A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member officer, or employee on any segment of the trip.</li> <li>OR -</li> </ul>
	<ul> <li>(B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip (see questions 6 and 10).</li> <li>— OR —</li> </ul>
	(C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
10.	USE ONLY IF YOU CHECKED QUESTION 9(B)  If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:
11.	An itinerary for the trip is attached to this form. I certify that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.
12.	Briefly describe the role of each sponsor in organizing and conducting the trip:
	The Pew Charitable Trusts is the sole organizer and sponsor of this trip.
3.	Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:
	See attachment.
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4.	Briefly describe each sponsor's prior history of sponsoring congressional trips:
	See attachment.
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See attachment.				
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21	Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:
	Lodging and meals are at the per diem rate for Richmond, VA.
	• • • • • • • • • • • • • • • • • • •
22.	Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:
	Transportation to Richmond will be provided via Amtrak using the lowest coach fare. Transportation back
	to Washington, DC, will be via coach bus.
23.	I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).
24.	List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:  N/A
25.	I hereby certify that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):  Signature of Travel Sponsor:  David Gilliland, Officer  David Gilliland, Officer
	Name of Organization: The Pew Charitable Trusts
	Address: 901 E Street, NW, 10th Floor, Washington, DC, 20004
	Telephone Number: (202) 552-2145
	Fax Number: (202) 552-2299
	E-mail Address: dgilliland@pewtrusts.org

#### Addendum to Private Sponsor Travel Certification Form, The Pew Charitable Trusts Management and Leadership Conference, September 15-17, 2017

- 1-10. See form
- 11. See attachment.
- 12. See form.
- 13. Through both its information and advocacy work, The Pew Charitable Trusts seeks to inform and advance the development of sound public policy in the United States, as well as to strengthen the institutions that form the foundations of our democracy. A major component of this ongoing strategy has been to help create an environment in which policy makers can productively deliberate important issues of the day. The purpose of the conference is to provide a collaborative environment for the chiefs of staff to learn from experts and discuss issues of importance to an effective legislative process.
- 14. The Pew Charitable Trusts has directly sponsored congressional travel. This will be the sixth Senate chiefs of staff conference hosted by Pew (2007, 2009, 2011, 2014, 2015). In the past, the Pew Charitable Trusts has also funded other institutions via grants to conduct their educational programs and some of these programs may have included congressional travel.
- 15. The Pew Charitable Trusts is driven by the power of knowledge to solve today's most challenging problems. Pew applies a rigorous, analytical approach to improve public policy, inform the public and invigorate civic life. We partner with a diverse range of donors, public and private organizations and concerned citizens who share our commitment to fact-based solutions and goal-driven investments to improve society. Pew issues dozens of research reports each year to educate the public and policy makers. Pew also sponsors convenings of researchers and experts to examine various issues of public policy and civic life.
- 16. See form.
- 17. See form.
- 18. See form.
- 19. See form.
- 20. See form.
- 21. See form.
- 22. See form.
- 23. See form.
- 24. See form.
- 25. See form.

List of invited staff for

### Management and Leadership Conference

Richmond, VA

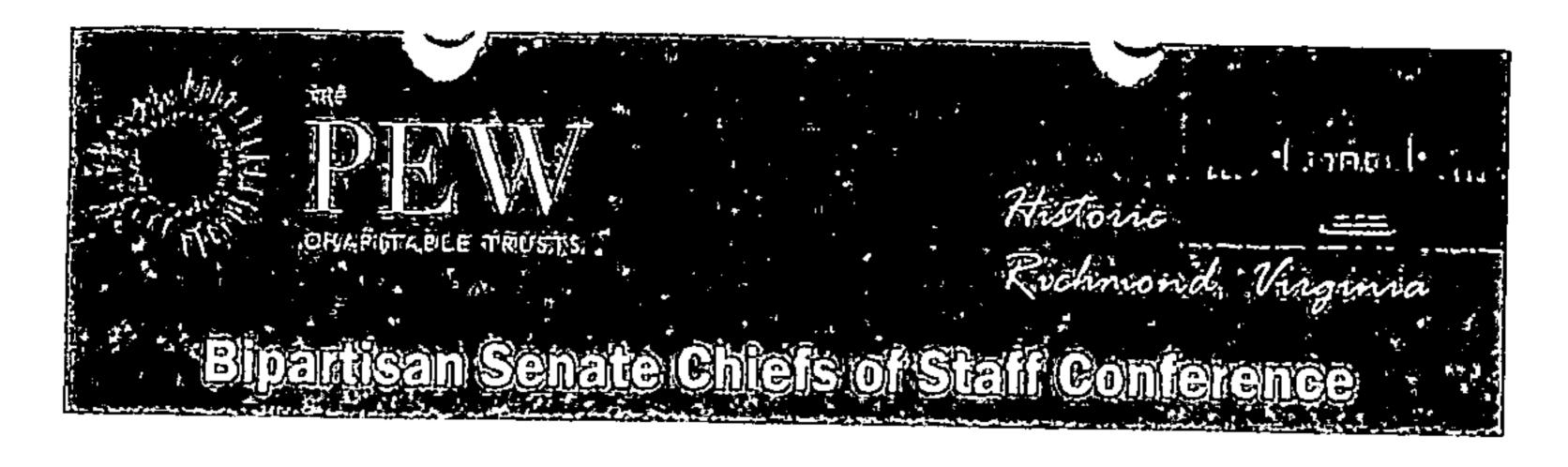
September 15-17, 2017

Sponsored by The Pew Charitable Trusts

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Blumenthal	C	T	Laurie		Rubiner		
Blunt	M	0	Stacy		McBride		
Booker	N.	<u> </u>	Matt		Klapper		
Boozman	AF	₹	Helen		Tolar		
Brown .	Ol	1	Sarah		Benzing		
Burr	NO		Dean		Myers		
Cantwell	WA	1	`Travis		Lumpkin		
Capito	W		Joel		Brubraker		
Cardin	MD	)	Chris		Lynch		
Carper	DE		Bill		Ghent		
Casey	PA	$\bot$	Kristen		Gentile		
Cassidy	LA		James		Quinn		
Cochran	MS	_	Brad ·		White		
Collins	ME		Steve		Abbott		
Coons	DE		Adam		Bramwell		
Corker	TN		Todd		Womack		
Cornyn	TX		Beth		Jafari		
Cornyn	TX		Monica		Popp		
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Hoeven	ND		Ryan		Bernstein	
Inhofe	OK		Luke	·	Holiand	
Isakson	GA		Joan		Kirchner Carr	
Johnson	w		Tony		Blando	
Kaine	VA		Mike		Henry	
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Scott	sc	Jennifer	DeCasper	
Shaheen	NH	Maura	Keefe	
Shelby	AL	Katie	Britt	
Stabenow	MI	Matt	VanKuiken	
Strange	AL	Kevin	Turner	
Sullivan	AK	Joe	Balash	
Tester	MT	Aaron	Murphy	
Thune	SD	Ryan	Nelson	
Tillis.	NC	Jordan	Shaw	
Toomey	PA	Dan	Brandt	
Udali	NM	Bianca	Ortiz Wertheim	
Van Hollen	MD	Karen	Robb	
Warner	VA	Mike	Harney	
Warren	MA	Dan	Geldon	
Whitehouse	RI	Sam	Goodstein	
Wicker	MS	Michelle	Richardson	
Wyden	OR	Jeff	Michels	
Young	IN	John	Connell	



#### Senate Chiefs of Staff Conference Itinerary Richmond, Virginia / September 15-17, 2017

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#### Friday, September 15, 2017

2:30pm Depart Union Station via Amtrak 95 (coach fare)

5:15pm Arrive 30<sup>th</sup> Main Street Station, Richmond

5:30pm Travel via bus to Jefferson Hotel, 101 W. Franklin Street

5:40pm Arrive Jefferson Hotel, check in (GSA per diem rate)

7:30-9:30pm Reception – Keynote historian/author (TBD); Review of the goals of

the weekend conference agenda.

#### Saturday, September 16, 2017

8:30-9:30am Breakfast at your leisure, Jefferson Hotel

9:30-11:30am Breakthrough Communication: Navigating High-Stakes

Conversations, Peter and Susan Glaser

Communication skills are the first step in developing strong relationships, making quality decisions, and creating high

performance teams. But, most importantly, communication can serve as a tool to constructively manage conflict. This training is rooted in the Glasers' 39 years of field-tested and published research on interpersonal communication and leadership development. Participants learn seven communication models to understand and

transform high-stakes conversations into a powerful and effective

stimulus for change.

**Qtt:**30am-12:00pm Break

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2:00-1:15pm Lunch with special guest, historical reenactor "Patrick Henry" – a

history lesson on Patrick Henry's role in the founding of the nation

and his opposition to the Constitution.

1:15-2:30pm State of the News Media, Amy Mitchell, Pew Research Center

Eight years after the Great Recession sent the U.S. newspaper industry into a tailspin, the pressures facing America's newsrooms have intensified to nothing less than a reorganization of the industry

itself, one that impacts the experiences of even those news

consumers \ ... ware of the tectonic shifts taking place. An., Mitchell will brief chiefs on the annual "State of the News Media" report and its implications on public policy.

2:45-3:30pm How Technology, Robotics and Automation May Affect the U.S.

Economy in the Future, David Pogue, Yahoo Technology

David Pogue is the tech critic for Yahoo Finance, and was previously the personal-technology columnist for the New York Times for 13 years. He's also a monthly columnist for Scientific American and host of science shows on PBS's "NOVA," and a correspondent for "CBS

Sunday Morning" since 2002.

6:00pm Buses depart for Governor's Mansion

6:15pm Arrive Governor's Mansion, Capitol Square

6:30-8:00pm Reception and dinner- Keynote remarks by Gov. Terry McAuliffe

8:00pm Buses Depart for Jefferson Hotel

Sunday, September 17, 2017

8:00-9:00am Breakfast at your leisure, Jefferson Hotel - Bag Call

9:00-10:00am It's the Economy - Bill McInturff, Public Opinion Strategies, and Geoff Garin, Hart

Reseach

Polisters McInturff and Garin will explore Americans' attitudes and views regarding jobs, the economy and the current state of the "American Dream" to

better inform chiefs of staff as they tackle legislation in these areas.

10:15-12:00pm Presidential Recordings - The Executive/Legislative Branch Relationship

Through History, the Miller Center at UVA

To assist chiefs in gaining a better understanding of effective working relationships between the legislative and executive branches, this session will explore the interactions between the president and Senate leadership over the years through the Miller Center's exhaustive collection of Oval Office recordings

from Kennedy through Nixon.

2:00pm Pick up box lunches

(#2:15pm Buses depart Jefferson Hotel for Washington C

දූී00pm (approx.) Arrive U.S. Capitol